

# FundZone

## ISA Cash Transfer

### Letter of Authority



FZMF37

These boxes are for adviser/Standard Life official use only.

When we say 'Standard life', 'we' or 'us' we mean Standard life Savings Limited.

#### ISA Transfer Letter of Authority

Please complete in BLOCK CAPITALS using BLACK INK.

#### Important Information

Any applications that we receive that have not been completed correctly may incur a delay or may have to be returned to you.

If you wish to transfer from more than one ISA Manager please use a separate Letter of Authority.

We can only accept documents with original signatures. Documents with faxed or photocopied signatures cannot be accepted.

This Letter of Authority **MUST** be submitted along with a fully completed ISA Transfer Application Form.

Adviser Code

Adviser to complete

Client Type

New  Existing

Existing account number (if applicable)

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#### Letter of Authority and details of ISA to be transferred

By completing this form and signing below, I hereby instruct the ISA Manager named below (the 'Existing ISA Manager'), within 30 days of receipt of these instructions or as soon as reasonably practicable to liquidate the investments in the Stocks and Shares component within my ISA investment and transfer the sale proceeds and interest to Standard Life Savings Limited (the 'New ISA Manager') subject to acceptance.

I further instruct my existing ISA Manager to provide Standard Life Savings Limited with any information requested in respect of the existing ISA including but not limited to transactions and dividend histories and details of the current portfolio and its value.

I understand that the cash transferred (in respect of the Stocks and Shares component for an ISA) will be reinvested in accordance with the instructions to the New ISA Manager indicated in Part 3.

I also instruct the ISA Manager named below to cease collections of my monthly savings plan with immediate effect.

Client Name

Client Address

<input type="text"/>	
<input type="text"/>	
<input type="text"/>	Postcode <input type="text"/>

Account Number (with current investment manager) – this information is essential as we are unable to transfer your investment without it.

**Letter of Authority and details of ISA to be transferred (continued)****Current Manager Details**

Current Manager Name

Current Manager Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Postcode

Current Manager's Telephone Number  
(include area dialling code)**Transfer details**

Please complete the sections below to tell Standard Life Savings Limited what Tax Years you are transferring to Standard Life.

**CURRENT TAX YEAR ISA**

Tax years run from 6th April – 5th April each year.

If the current manager named above holds your CURRENT TAX YEAR ISA please indicate what type of ISA it is by entering an 'X' into the appropriate box below.

STOCKS AND SHARES ISA CASH ISA 

Date of First Subscription

Subscription for Current Tax Year

£ **AND/OR****PREVIOUS TAX YEARS**

Please indicate what investments the current manager named above holds, that you wish to transfer to Standard Life, by entering an 'X' in the appropriate box below.

STOCKS AND SHARES ISA CASH ISA 

TOTAL ESTIMATED ISA VALUE

£ **Client signature**

Please ensure that all relevant sections of this document have been completed as required. You must sign in the box below to enable us to process your transfer request.

Signature

Date

**INFORMATION FOR CURRENT ISA MANAGER**

It is important that all cheques and documentation must quote the SP account number. Please send all cheques and confirmation of transfer to:

**Standard Life, FundZone Customer Centre, Dundas House, 20 Brandon Street, Edinburgh, EH3 5PP.**